

Review My Locality's Transfers in Progress

Process

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Effective Date

08/16/2005

Purpose

The Review My Locality's Transfers in Progress task provides specific instructions for reviewing locality pending transfers in progress in IRMS. The Locality Representative typically performs this task when there is a need to review locality pending transfer coming **To** or going **From** your locality. The Special Notes and Procedure will assist you in the manual process of reviewing locality pending transfers for your locality in IRMS.

Special Notes

- Locality Representatives can only review locality pending transfers in progress information coming **To** your locality or going **From** your locality.

Procedure

Responsibility

Locality Representative

Steps

1. Establish the business need to monitor the transfer of Local Sales Tax for your locality.
2. Access the locality information in IRMS.
 - A. Select "Tax Information: Locality Pending Transfers in Progress" from the Main window.
NOTE: The Locality Pending Transfer in Progress Summary window opens.
 - B. Enter your locality's FIPS Code.
 - C. Select FIND.
NOTE: The system prompts you if tax entity (FIPS Code) does not exist and pending transfers cannot be located.
 1. If the FIPS Code does not exist or there are no transfers in progress,
 - a. Verify the FIPS Code and re-enter if necessary.
 - b. End this task if no match is found.
 2. If the FIPS Code matches a transfer in progress and the information is displayed, continue to Step 3.
3. Review the information in the Locality Pending Transfers In Progress Summary window.
 - Transaction Date (MM/DD/YYYY)
 - Tax Account Number
 - Customer Name

- Item Number
- **From** FIPS Code
- **To** FIPS Code
- Period (MM/YYYY - MM/YYYY)
- Total Amount of Transfer
- Amount Transferred
- Balance to be Transferred

4. Use the information as needed in your daily activities.

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